ClientPulse

for Consulting Firms

Complete Capability Guide

Every feature and function of the ClientPulse consulting operating system: what it does, where to find it, and how to use it most efficiently.

clientpulse.ltd
Prepared for ClientPulse clients and prospective clients

Menu

The guide is organised into 17 capability areas. Each area lists every feature, with a full description, how to access it, and how to get the most from it.

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How to read the availability line

Each feature shows the plans that include it. Plans are Practice ($149/mo, up to 5 users), Firm ($399/mo, 6–20 users), Enterprise ($799/mo, 21–50 users) and Custom. Where a feature requires an upgrade module — Advanced Project Operations ($99), Resource Capacity & Margin Intelligence ($149), AI Project Intelligence ($199) or Finance & Billing Operations ($129) — that is stated. All four modules are available together as the Complete Consulting Operations bundle at $299 per month, a saving of $277.

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01 CRM and business development

7 features in this area.

Companies and contacts

Included on all plans

The system of record for every client organization and every person you deal with, including titles, email addresses, LinkedIn profiles, phone numbers and a full interaction history. Contacts carry their own activity timeline so nothing about a relationship lives in your inbox alone.

HOW TO ACCESS	App > CRM > Companies, or CRM > Contacts. Add a company first, then attach contacts to it so history rolls up correctly.
USE IT WELL	Always create the company before the contact, and always fill in the LinkedIn URL. Company linkage drives pipeline and engagement reporting, and the LinkedIn URL is what makes the manual LinkedIn outreach track available for contacts who have no email address.

Opportunities and pipeline

Included on all plans

Tracks prospective work from first conversation to signed engagement, with value, expected close date, stage and owner. The pipeline view shows weighted and unweighted totals so you can see what is really likely to land.

HOW TO ACCESS	App > CRM > Opportunities. Create an opportunity from a company record so it inherits the client relationship.
USE IT WELL	Update the stage the same day something changes rather than in a weekly clean-up. Stage age is what surfaces stalled deals, and it is only accurate if the dates are honest.

Custom opportunity stages

Included on all plans

Rename, reorder, add or retire pipeline stages so the pipeline mirrors how your practice actually sells rather than a generic sales funnel.

HOW TO ACCESS	App > CRM > Opportunities > pipeline settings.
USE IT WELL	Keep it to five or six stages with a clear, testable exit criterion for each one. Stages that cannot be objectively verified produce forecasts nobody trusts.

Lead-source tracking

Included on all plans

Records where each opportunity originated — referral, LinkedIn, prior client, event, inbound — so you can see which channels actually convert into revenue.

HOW TO ACCESS	Set the lead source field when creating an opportunity; review it in pipeline reporting.
USE IT WELL	Use a short, fixed vocabulary of sources. Free-typed variations of the same source fragment the reporting and hide your best channel.

Follow-up tasks and reminders

Included on all plans

Dated, owned tasks attached to a contact, company or opportunity, with completion tracking. They appear in your work list and in the record's history when completed.

HOW TO ACCESS	Create from any contact, company or opportunity record; review from the CRM task list.
USE IT WELL	Never close a client conversation without creating the next task with a real date. An opportunity with no open task is the single most reliable predictor of a deal going quiet.

Pipeline reporting

Included on all plans

Summarizes open pipeline by stage, owner, value and age, with conversion rates and expected close timing.

HOW TO ACCESS	App > CRM > Reports > Pipeline.
USE IT WELL	Review it once a week at a fixed time and act on stage age first. Aging is a leading indicator; value totals are a lagging one.

Engagement conversion from a won opportunity

Included on all plans

Turns a won opportunity directly into a delivery engagement, carrying the client, contract value, contacts and context across so nothing is retyped and the sales-to-delivery link is preserved.

HOW TO ACCESS	Mark the opportunity as won, then choose Convert to engagement.
USE IT WELL	Convert immediately on the win rather than after the kickoff meeting. Converting first means kickoff notes, meetings and tasks land inside the engagement from day one instead of being migrated later.

02 CP Intelligence and outreach

10 features in this area.

CP Intelligence prospect research

Included on all plans

Turns a LinkedIn profile or a company name into a structured prospect briefing: business hypothesis, likely operating pressures framed as questions rather than assumptions, and a matched view of relevant prior work.

HOW TO ACCESS	App > CRM > contact record > Generate CP Intelligence.
USE IT WELL	Save your inputs first using Save inputs, then generate. Stakeholders and known issues captured before generation materially improve the hypothesis.

Confidentiality ceiling and permitted proof points

Included on all plans

Every historical result, saving, percentage, vendor count or client outcome used in outreach must come from a proof point that passes the selected confidentiality ceiling and is marked externally permitted. Internal-only project content is structurally excluded, not filtered out afterwards.

HOW TO ACCESS	Set the ceiling in the CP Intelligence generation panel before running.
USE IT WELL	Curate your permitted proof points once, properly. The strength of every generated email is limited by what you have actually cleared for external use.

Approved Company Messaging library

Included on all plans

A separate library of firm-approved positioning, capabilities, differentiators and sender identity, kept strictly apart from client projects and proof points. It lets the system write persuasively even where no client evidence may be quoted.

HOW TO ACCESS	App > Settings > Approved Company Messaging.
USE IT WELL	Keep the capability statements concrete and specific. Generation is blocked without a messaging record, and generic messaging produces generic email.

Deterministic safety validation

Included on all plans

Before display and before saving, every claim in the generated package is traced to a permitted source. Unsupported claims are removed, blocked internal content is labelled, sender identity is enforced and email structure is validated. Output that cannot pass is regenerated automatically.

HOW TO ACCESS	Automatic on every generation; results shown in the Generation inputs and warnings panel.
USE IT WELL	Read the warnings panel rather than skipping it. It tells you precisely which evidence gap is limiting the strength of the sequence.

Four-email outreach sequences

Included on all plans

Generates a sequence of four meaningfully different emails within controlled word budgets, each grounded in one approved capability, with discovery questions and a deterministic set of CRM tasks.

HOW TO ACCESS	Generated with CP Intelligence; reviewed in the intelligence panel on the contact.
USE IT WELL	Review the first email as a person, not as an approver. The safeguards guarantee it is defensible; only you can confirm it sounds like you.

LinkedIn manual track

Included on all plans

For contacts with no email address, a structured manual LinkedIn track of connection, message and follow-up steps, presented as tasks. Completing a step logs the activity to the client record automatically, and completing a later step marks the earlier ones complete.

HOW TO ACCESS	Contact record > sequences panel > Start LinkedIn track.
USE IT WELL	Complete each step in ClientPulse on the day you send it in LinkedIn. That is what keeps the client history and the sequence report accurate.

Approve draft and save to CRM

Included on all plans

Saves the reviewed intelligence package and its draft outreach to the CRM. It does not enroll anyone or send anything — enrollment is a separate, deliberate action.

HOW TO ACCESS	Intelligence panel > Approve draft & save to CRM.
USE IT WELL	Approve and save first, send later. Separating review from launch is what keeps a fast draft from becoming an accidental send.

Start email sequence with launch gate

Included on all plans

A separate action that enrolls the contact in an approved sequence, behind a review overlay showing account, recipient, send dates and content, and a server-side gate confirming the contact, package and sequence all match.

HOW TO ACCESS	Contact record > sequences panel > Start email sequence.
USE IT WELL	Read the review overlay dates before confirming. The gate protects against mismatched records; only you can catch a bad send date.

Manual copy-out for external send

Included on all plans

Copy a sequence email as rich HTML, with the correct signature, to send from Outlook, Gmail or eM Client. The copy-out is recorded so the client history stays complete.

HOW TO ACCESS	Sequence step > Copy for external send.
USE IT WELL	Use copy-out when the relationship warrants a personal send from your own mailbox, and still mark the step complete so reporting stays accurate.

Sequence delivery history on the client record

Included on all plans

Every sequence step, send, copy-out and LinkedIn action appears in the client record history and in the CRM Sequence Activity report.

HOW TO ACCESS	Contact record > Sequence delivery history; firm view in Reports > Sequence activity.
USE IT WELL	Check the sequence history before any call with the prospect. Walking into a conversation not knowing what was sent last week is entirely avoidable.

03 Engagement management

11 features in this area.

Engagement Command Center

Included on all plans

The single screen for one engagement: health, completion, phases, tasks, milestones, deliverables, RAID, meetings, team, time, finance, forecast and documents, all in one tabbed workspace.

HOW TO ACCESS	App > Projects > select an engagement. The URL is /app/crm/projects/.
USE IT WELL	Make this the page you open first each morning rather than the task list. It shows the engagement's exceptions in priority order, which the task list cannot do.

Project health indicators

Included on all plans

A rolled-up green / amber / red signal per engagement derived from schedule slippage, overdue tasks, open high-severity RAID items and budget position.

HOW TO ACCESS	Shown on every engagement card in Projects and at the top of the Command Center.
USE IT WELL	Treat amber as the action point, not red. By the time an engagement turns red the recovery options are usually contractual rather than operational.

Needs Attention list and upcoming work

Included on all plans

An automatically maintained list of the specific items dragging the engagement — overdue tasks, unapproved time, stale RAID actions, deliverables waiting on the client — alongside what is due next.

HOW TO ACCESS	Top of the Engagement Command Center overview tab.
USE IT WELL	Work this list to empty before status reporting. Anything left on it at report time is by definition something the client needs to hear about.

Weighted project completion

Included on all plans

A calculated completion percentage built from phase weights, task progress, milestone credit and deliverable status, rather than a number someone types in.

HOW TO ACCESS	Command Center > Overview, in the completion panel.
USE IT WELL	Set realistic phase weights at kickoff. The engine is only as good as the weights, and weights are far harder to argue about at the start than mid-delivery.

Calculated versus official completion

Included on all plans

Shows the system-calculated figure and the Engagement Manager's official assessment side by side, so the difference between the mechanical view and professional judgement is visible instead of hidden.

HOW TO ACCESS	Command Center > Overview > completion panel.
USE IT WELL	Investigate any gap of more than ten points. A persistent gap means either the plan structure is wrong or the delivery reality is not reflected in the tasks.

Engagement Manager override with required reason

Included on all plans

The Engagement Manager can set the official completion figure, but only with a written reason. The calculated number is never overwritten or lost.

HOW TO ACCESS	Command Center > Overview > completion panel > Set official assessment.
USE IT WELL	Write the reason for the client, not for yourself. That sentence is what ends up defending the position in a commercial conversation months later.

Completion-override history

Included on all plans

A full dated record of every official assessment, who set it, the value and the reason given.

HOW TO ACCESS	Command Center > Overview > completion panel > History.
USE IT WELL	Read the override history before writing any status report. It is the fastest available narrative of how the engagement actually progressed.

Multiple engagement managers

Included on Firm, Enterprise, Custom

Assign more than one Engagement Manager to a single engagement, each with approval rights, for larger or co-led work.

HOW TO ACCESS	Command Center > Team tab > assign role Engagement Manager.
USE IT WELL	Name one manager as the approval owner even when two are assigned, and record which one in the engagement description. Shared approval authority without a named owner slows every decision.

Engagement templates and reusable structures

Included on Firm, Enterprise, Custom

Save a phase, task, milestone and deliverable structure once and instantiate it on every new engagement of that type.

HOW TO ACCESS	Projects > New engagement > Start from template; manage templates in Projects > Templates.
USE IT WELL	Build the template from an engagement that actually went well, then prune it. Templates grown from real delivery are adopted; templates written in the abstract are ignored.

Advanced engagement templates

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Richer templates carrying dependencies, default owners by role, weighting, deliverable ladders and standard RAID starters, for firms running repeatable methodologies.

HOW TO ACCESS	Projects > Templates, with Advanced Project Operations enabled.
USE IT WELL	Maintain one template per service line and version it. Editing a live template mid-quarter makes engagements incomparable.

Standardized delivery frameworks

Included on Enterprise, Custom

Firm-wide delivery frameworks that enforce a consistent phase and gate structure across every engagement, so portfolio reporting compares like with like.

HOW TO ACCESS	Firm settings > Delivery frameworks, on the Enterprise plan.

USE IT WELL

Standardize the phase names and gates first, and let task detail vary by engagement. Consistency at the phase level is what makes portfolio completion meaningful.

04 Tasks, phases and workstreams

6 features in this area.

Project phases and workstreams

Included on all plans

Structure the engagement into phases over time and workstreams across parallel effort, each with its own owner, dates and weight.

HOW TO ACCESS	Command Center > Plan tab > Phases / Workstreams.
USE IT WELL	Keep phases to five or fewer and give each an explicit exit criterion. More phases produce a prettier plan and worse control.

Tasks, assignments and priorities

Included on all plans

Individual units of work with an owner, due date, priority, status and links to the phase, workstream or RAID item that produced them.

HOW TO ACCESS	Command Center > Tasks tab.
USE IT WELL	Every task needs one named owner and one date. Tasks owned by a team or with a date of "this sprint" never reliably close.

Task dependencies

Included on all plans

Link tasks so that a successor's timing is understood in terms of its predecessor, making sequencing visible instead of implicit.

HOW TO ACCESS	Open a task > Dependencies > add predecessor.
USE IT WELL	Only model dependencies that genuinely constrain the schedule. Over-linking makes every date move whenever anything slips and trains people to ignore the warnings.

Workstream and phase health

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Health rollups at the workstream and phase level, so you can see which part of a large engagement is in trouble rather than only that the engagement as a whole is amber.

HOW TO ACCESS	Command Center > Plan tab, with Advanced Project Operations enabled.
USE IT WELL	Review workstream health before the weekly internal call and give each workstream lead thirty seconds on their own colour. It makes the meeting about exceptions.

Expanded task and dependency reporting

Included on Firm, Enterprise, Custom

Cross-engagement task and dependency reporting: overdue by owner, dependency chains at risk, and throughput trends.

HOW TO ACCESS	Reports > Delivery, on the Firm plan and above.
USE IT WELL	Sort by owner rather than by engagement when you review it. Chronic overdue work almost always concentrates in one or two people's capacity, not one project.

Expanded project audit history

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

A detailed audit trail of plan changes — dates moved, scope added, owners reassigned, status changed — with who and when.

HOW TO ACCESS	Command Center > History, with Advanced Project Operations enabled.
USE IT WELL	Export the audit history at each phase gate. It is the cheapest possible defence in a scope dispute and worthless if you only think of it afterwards.

05 Milestones and dependencies

6 features in this area.

Milestones with binary completion credit

Included on all plans

Milestones are either complete or not. A milestone earns its credit only when it carries an actual completion date or Complete status — there is no partial credit for a milestone in progress.

HOW TO ACCESS	Command Center > Plan tab > Milestones.
USE IT WELL	Record the actual completion date on the day it happens. Backfilling dates later distorts every completion and burn comparison in between.

Milestone reporting

Included on Firm, Enterprise, Custom

Milestone attainment reporting across an engagement or the portfolio, showing planned versus actual dates and slippage.

HOW TO ACCESS	Reports > Milestones, on the Firm plan and above.
USE IT WELL	Report on planned-versus-actual slippage in days, not on the count achieved. Counts hide the two milestones that are eight weeks late.

Advanced dependency-chain analysis

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Traces full dependency chains across phases and workstreams to show what a single slip actually causes downstream.

HOW TO ACCESS	Command Center > Plan tab > Dependency analysis, with Advanced Project Operations enabled.
USE IT WELL	Run it before agreeing to any client-requested date change. It converts "we can probably absorb that" into a specific, defensible answer.

Dependency-slip warnings

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Automatic alerts when a predecessor slips far enough to put its successors, or a milestone, at risk.

HOW TO ACCESS	Surfaced in Needs Attention and in the Plan tab, with Advanced Project Operations enabled.
USE IT WELL	Act on the first warning in a chain rather than the last. Recovery cost rises roughly with the number of downstream links already affected.

Critical-path visibility

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Identifies the sequence of work that actually determines the end date, so attention and staffing go where they change the outcome.

HOW TO ACCESS	Command Center > Plan tab > Critical path, with Advanced Project Operations enabled.
USE IT WELL	Re-check the critical path after any significant replan. Adding resource to non-critical work is the most common way consulting firms spend money without moving a date.

Expanded milestone forecasting

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Projects likely milestone dates from current task progress and dependency state instead of relying on the original plan.

HOW TO ACCESS	Command Center > Plan tab > Forecast, with Advanced Project Operations enabled.
USE IT WELL	Compare the forecast against the contractual dates weekly and escalate the gap early. Forecasts are only valuable if someone is accountable for the variance.

06 Deliverables

6 features in this area.

Deliverable register

Included on all plans

A single list of everything you have contracted to hand over, with owner, due date, current status and client review dates.

HOW TO ACCESS	Command Center > Deliverables tab.
USE IT WELL	Build the register directly from the statement of work at kickoff. If a deliverable is not in the register it will not appear in completion, billing or status reporting.

Full deliverable status ladder

Included on all plans

Deliverables move through an explicit ladder — not started, in progress, internal review, with client, revision requested, accepted — so "nearly done" is never a status.

HOW TO ACCESS	Command Center > Deliverables tab > change status on any deliverable.
USE IT WELL	Move the status on the day the state changes, especially into With client. That single field is what powers waiting-on-client reporting and protects you on schedule.

Deliverable revision history

Included on all plans

Every version and revision request is retained with dates and requester, so the trail of what changed and why is preserved.

HOW TO ACCESS	Open a deliverable > History.
USE IT WELL	Log the client's revision request as a revision rather than editing the deliverable quietly. Unrecorded rework is where fixed-fee margin disappears.

Client review dates and waiting-on-client indicators

Included on all plans

Tracks how long a deliverable has been sitting with the client, and flags engagements where the delay is on the client's side rather than yours.

HOW TO ACCESS	Command Center > Deliverables tab; rolled up in Needs Attention.
USE IT WELL	Quote the waiting-on-client days verbatim in your status report. Precise, factual delay days change client behaviour far more reliably than a general reminder.

Deliverable approval history

Included on Firm, Enterprise, Custom

A dated record of formal acceptance — who approved, when and against which version.

HOW TO ACCESS	Open a deliverable > Approvals, on the Firm plan and above.
USE IT WELL	Get acceptance recorded before starting the next deliverable. Acceptance chased in bulk at the end of an engagement is the slowest money in consulting.

Deliverable workflow history

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

The full workflow trail including every status transition, reviewer and turnaround duration, for firms that need to evidence process.

HOW TO ACCESS	Open a deliverable > Workflow history, with Advanced Project Operations enabled.
USE IT WELL	Use the turnaround durations to set realistic internal review windows in your next proposal, rather than repeating optimistic ones.

07 RAID and client actions

8 features in this area.

Risks, assumptions, issues, decisions and actions

Included on all plans

A complete RAID log covering all five record types, each with owner, severity, target date and status, held inside the engagement rather than in a spreadsheet.

HOW TO ACCESS	Command Center > RAID tab.
USE IT WELL	Raise the risk the moment you feel it, not when it is provable. A risk logged early and closed is a credibility gain; the same item logged late is an excuse.

RAID ownership, target dates and escalation

Included on all plans

Every RAID item carries a named owner, a target resolution date and an escalation state, so nothing sits unassigned.

HOW TO ACCESS	Command Center > RAID tab > open any item.
USE IT WELL	Review items with a passed target date at every internal call. An unowned or undated RAID item is a note, not a control.

RAID-to-task linking

Included on all plans

Link a RAID item to the tasks created to address it, so the mitigation is visible from the risk and the reason is visible from the task.

HOW TO ACCESS	Open a RAID item > Linked tasks > link or create task.
USE IT WELL	Create the mitigation task from inside the RAID item rather than separately. Tasks created elsewhere lose the link and the RAID item then appears to be sitting untouched.

Automatic action closure on linked task completion

Included on all plans

When every task linked to a RAID action is completed, the action closes automatically with the completion recorded, removing double bookkeeping.

HOW TO ACCESS	Automatic; visible in the RAID tab and the item history.
USE IT WELL	Rely on it rather than closing actions manually. Manual closure ahead of the linked tasks is the main way RAID logs stop matching reality.

Client actions and escalation

Included on all plans

Tracks items you are waiting on the client to do, with owner on the client side, due date and escalation status, separated from your own actions.

HOW TO ACCESS	Command Center > RAID tab > Client actions.
USE IT WELL	Restate open client actions with their ages in every status report and every meeting. Client-side delay that is not documented weekly becomes your delay in retrospect.

Firm-level attention and waiting-on-client reporting

Included on Firm, Enterprise, Custom

Aggregates across all engagements to show where the firm is blocked and how much of that is client-side.

HOW TO ACCESS	Reports > Attention, on the Firm plan and above.
USE IT WELL	Review this before partner or leadership meetings. It converts a set of individual project complaints into one prioritized list.

RAID-to-task automation

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Automatically generates the standard mitigation tasks when a risk or issue of a given type and severity is raised.

HOW TO ACCESS	Firm settings > RAID automation, with Advanced Project Operations enabled.
USE IT WELL	Automate only your two or three highest-frequency risk types at first. Broad automation produces task noise, which is worse than no automation.

Advanced client-action escalation

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Rules-based escalation of overdue client actions through defined stages with dated notifications and a documented trail.

HOW TO ACCESS	Firm settings > Escalation rules, with Advanced Project Operations enabled.
USE IT WELL	Agree the escalation ladder with the client sponsor at kickoff and reference it when it triggers. Escalation that was pre-agreed is administration; escalation that was not is conflict.

08 Meetings and AI proposals

9 features in this area.

First-class meeting records

Included on all plans

Meetings are permanent records inside the engagement — date, attendees, agenda, notes, decisions — not comments buried in a task. Everything the AI later proposes is traceable back to one of these records.

HOW TO ACCESS	Command Center > Meetings tab > New meeting.
USE IT WELL	Create the meeting record before the meeting and paste the agenda in. Notes typed into an existing record during the call are far more complete than notes reconstructed afterwards.

Agenda, notes, decisions and attendees

Included on all plans

Structured fields for what you intended to cover, what was said, what was decided and who was present, so decisions are separable from discussion.

HOW TO ACCESS	Command Center > Meetings tab > open a meeting.
USE IT WELL	Record decisions in the decisions field, not in the notes. Only clearly separated decisions can be defended later without rereading the whole transcript.

AI meeting extraction into proposals

Included on all plans

The AI reads the meeting record and proposes tasks, risks, issues, decisions, milestones and deliverables. Nothing is written into the plan — each item arrives as a proposal awaiting a human decision.

HOW TO ACCESS	Command Center > Meetings tab > open a meeting > Extract proposals.
USE IT WELL	Run extraction immediately after the meeting while the notes are complete. Extraction quality is a direct function of note quality, not of how long you wait.

Human approval before proposals enter the plan

Included on all plans

Every proposal must be explicitly approved by an Engagement Manager before it becomes a task, risk or milestone. The AI can suggest; it cannot change the plan.

HOW TO ACCESS	Command Center > Meetings tab > Proposals > Approve or Reject.
USE IT WELL	Clear the proposal queue within twenty-four hours. Proposals reviewed later are approved carelessly, which is how AI-suggested work quietly becomes committed scope.

Verbatim meeting evidence and source traceability

Included on all plans

Each proposal displays the exact meeting text it came from, so you can confirm the client actually said it before you accept the work.

HOW TO ACCESS	Command Center > Meetings tab > Proposals > expand any proposal to see its evidence.
USE IT WELL	Read the evidence, not the summary, when a proposal implies new scope. The evidence is what tells you whether it was a commitment or a passing remark.

Proposal approval, rejection and supersede history

Included on all plans

Approvals, rejections and reasons are retained permanently. Re-extracting a meeting never deletes undecided proposals — they are marked superseded, so the audit trail is complete.

HOW TO ACCESS	Command Center > Meetings tab > Proposals > History.
USE IT WELL	Write a reason when rejecting. Rejection reasons are what stop the same item being re-proposed and re-argued after every subsequent meeting.

AI engagement summaries and status-report preparation

Requires the AI Project Intelligence module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Drafts an engagement summary and status report from actual plan, RAID, milestone and financial data, ready for you to edit and issue.

HOW TO ACCESS	Command Center > Reports > Draft status report, with AI Project Intelligence enabled.

USE IT WELL	Let the AI draft and then rewrite the client-facing conclusion yourself. The data assembly is where the time goes; the judgement sentence is where your value is.

AI risk identification and next-action recommendations

Requires the AI Project Intelligence module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Reviews current engagement state to identify emerging risk patterns and recommend concrete next actions, each traceable to the underlying records.

HOW TO ACCESS	Command Center > Overview > AI insights, with AI Project Intelligence enabled.
USE IT WELL	Run it before a phase gate rather than weekly. Gate points are where an outside pattern check changes a decision that is still reversible.

Bulk approval and duplicate-proposal protection

Requires the AI Project Intelligence module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Approve batches of proposals at once, with automatic detection of proposals duplicating items already in the plan.

HOW TO ACCESS	Command Center > Meetings tab > Proposals > Select all / Approve selected, with AI Project Intelligence enabled.
USE IT WELL	Bulk-approve only the tasks. Review risks, milestones and deliverables individually — those are the item types that change scope and commercials.

09 Team and resource management

8 features in this area.

Engagement team assignments

Included on all plans

Assign named people to an engagement so ownership, workload and access all follow from a single team list.

HOW TO ACCESS	Command Center > Team tab > Add team member.
USE IT WELL	Assign the team before assigning tasks. Task ownership options and engagement access both derive from this list, so doing it out of order creates rework.

Team roles and responsibilities

Included on Firm, Enterprise, Custom

Each team member carries a defined role — owner, engagement manager, consultant, contractor, client viewer — which determines what they can see, edit and approve.

HOW TO ACCESS	Command Center > Team tab > set role, on the Firm plan and above.
USE IT WELL	Give contractors the contractor role rather than consultant. Role choice is the control that keeps rates, margin and other clients' data out of view.

Cross-engagement team and workload view

Included on Firm, Enterprise, Custom

Shows who is on which engagement and how loaded they are across the whole firm, not just within one project.

HOW TO ACCESS	App > Projects > Team view, on the Firm plan and above.
USE IT WELL	Check it before committing a start date in a proposal. Most delivery pain in small firms is a staffing promise made without a cross-engagement view.

Capacity planning and utilization monitoring

Requires the Resource Capacity & Margin Intelligence module on all plans; included in the Complete Consulting Operations bundle

Plans available hours against committed hours per person per week and tracks realized utilization against target.

HOW TO ACCESS	Command Center > Forecast tab, and Reports > Capacity, with Resource Capacity & Margin Intelligence enabled.
USE IT WELL	Plan capacity in weeks, not months. Monthly averages conceal exactly the two-week crunches that cause quality failures and burnout.

Overallocation and underutilization warnings

Requires the Resource Capacity & Margin Intelligence module on all plans; included in the Complete Consulting Operations bundle

Flags each person and week where committed hours exceed available capacity, or fall materially below target utilization.

HOW TO ACCESS	Forecast tab; flagged per person per week, with Resource Capacity & Margin Intelligence enabled.
USE IT WELL	Resolve overallocation by moving work, not by assuming overtime. An overallocation left unresolved becomes a schedule slip roughly one to two weeks later.

Resource-demand forecasting

Requires the Resource Capacity & Margin Intelligence module on all plans; included in the Complete Consulting Operations bundle

Projects the roles and hours the current portfolio and pipeline will require, so hiring and subcontracting decisions are made early.

HOW TO ACCESS	Reports > Forecast > Demand, with Resource Capacity & Margin Intelligence enabled.
USE IT WELL	Include weighted pipeline, not just signed work. Recruiting lead time is longer than most sales cycles, so signed-only forecasting always arrives too late.

Role and skill matching

Requires the Resource Capacity & Margin Intelligence module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Matches available people to open demand by role and skill, so staffing decisions consider fit and not just availability.

HOW TO ACCESS	Reports > Forecast > Staffing, with Resource Capacity & Margin Intelligence enabled.
USE IT WELL	Maintain the skill tags honestly, including the ones people are still developing. Aspirational skill data produces confident, wrong staffing.

Cross-engagement scheduling

Requires the Resource Capacity & Margin Intelligence module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Schedules people across several engagements at once, showing the combined commitment and the conflicts before they are made.

HOW TO ACCESS	Reports > Forecast > Schedule, with Resource Capacity & Margin Intelligence enabled.
USE IT WELL	Do all scheduling in one weekly pass across the whole portfolio. Engagement-by-engagement scheduling is what creates the conflicts this view exists to prevent.

10 Time and expenses

10 features in this area.

Log hours, billable and non-billable

Included on all plans

Record time against an engagement, phase and task, marked billable or non-billable, with a note. Time is a first-class financial record, not a spreadsheet import.

HOW TO ACCESS	Command Center > Time tab > Log time.
USE IT WELL	Log daily. Time entered weekly is consistently understated, and understated time silently overstates your reported margin.

Log expenses

Included on all plans

Record engagement expenses with amount, category, date, billable flag and description, so recoverable costs are captured against the right engagement.

HOW TO ACCESS	Command Center > Time tab > Log expense.
USE IT WELL	Mark rebillable expenses billable at entry. Reclassifying expenses after invoicing means either a credit note or an absorbed cost.

See your own entries

Included on all plans

Every user can see and manage their own time and expense entries, and only their own, until an approver acts on them.

HOW TO ACCESS	Command Center > Time tab, filtered to you by default.
USE IT WELL	Review your own pending entries before the approval run. Corrections made before approval cost nothing; corrections after approval require an adjustment record.

Owner / Engagement Manager approval or rejection

Included on all plans

Time and expenses require approval by the engagement owner or manager. Rejections carry a reason and return to the submitter.

HOW TO ACCESS	Command Center > Time tab > Pending approval.
USE IT WELL	Approve on a fixed weekly cadence, before invoicing. Approval is the point at which the rate is fixed, so a delayed approval delays the invoice, not just the paperwork.

Server-side financial permissions

Included on all plans

Who may see rates, costs and margin is enforced on the server, not by hiding buttons in the interface. A consultant cannot retrieve financial data they are not entitled to.

HOW TO ACCESS	Automatic and always on; roles are set in Command Center > Team tab.
USE IT WELL	Verify the role of anyone new before their first week. The permission model is reliable, but only as accurate as the role you gave them.

Rate snapshot at approval (approved history never rewritten)

Included on all plans

When time is approved, the applicable rate is captured onto the record. Later rate-card changes never retroactively alter approved history.

HOW TO ACCESS	Automatic at approval; visible on each approved entry.
USE IT WELL	Load a new rate card with its effective date before the period it applies to, and approve outstanding time first. That sequence keeps the old period at the old rate cleanly.

Approved-hours and approved-expense summary

Included on all plans

Totals of approved hours and expenses per engagement, per person and per period — the basis for every downstream financial figure.

HOW TO ACCESS	Command Center > Time tab > Summary.
USE IT WELL	Reconcile this against your billing expectation before generating invoices. Every invoice dispute traces back to something visible here first.

Team time and expense totals

Included on Firm, Enterprise, Custom

Aggregated time and expense across the whole engagement team rather than the individual view.

HOW TO ACCESS	Command Center > Time tab > Team totals, on the Firm plan and above.
USE IT WELL	Compare each person's approved hours to their planned hours weekly. Sustained variance is either a scoping error or an estimating error, and both need fixing early.

Planned versus approved hours

Included on Firm, Enterprise, Custom

Compares the hours planned for phases and tasks against the hours actually approved, exposing effort overrun before cost overrun appears.

HOW TO ACCESS	Command Center > Time tab > Planned vs approved, on the Firm plan and above.
USE IT WELL	Watch this rather than the budget number. Effort overrun shows up here weeks before it shows up in the financial summary.

Effective-dated rate card administration

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Maintain billing and cost rates by person or role with effective dates, so historical periods keep their historical rates.

HOW TO ACCESS	Firm settings > Rate cards, with Finance & Billing Operations enabled.
USE IT WELL	Set both a bill rate and a cost rate for every person. Missing cost rates are excluded from margin rather than guessed, which quietly overstates profitability.

11 Billing and collections

10 features in this area.

Basic invoice preparation

Included on all plans

Assemble an invoice from approved time, expenses and milestones with client details, dates and totals, ready to issue.

HOW TO ACCESS	Command Center > Finance tab > Invoices > New invoice.
USE IT WELL	Prepare invoices immediately after the approval run rather than at month end. The queue is small, the records are fresh and the questions get answered in hours.

Outstanding invoice and collection summary

Included on Firm, Enterprise, Custom

Shows issued, outstanding and overdue invoices with ageing, so the cash position is visible without a separate spreadsheet.

HOW TO ACCESS	Reports > Finance > Outstanding, on the Firm plan and above.
USE IT WELL	Look at it weekly, on the same day. Collections in professional services respond almost entirely to consistent, dated follow-up.

Deterministic draft-invoice generation from approved records

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Generates a draft invoice strictly from approved time, approved expenses and completed milestones. Nothing is estimated, inferred or rounded by an AI model.

HOW TO ACCESS	Command Center > Finance tab > Generate draft invoice, with Finance & Billing Operations enabled.
USE IT WELL	Complete the approval run first. The generator deliberately excludes unapproved records, so anything not approved simply will not bill this cycle.

Source-record citation on every invoice line

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Every line on the draft invoice cites the underlying approved records that produced it, so any figure can be traced to its source.

HOW TO ACCESS	Open a draft invoice > expand any line, with Finance & Billing Operations enabled.
USE IT WELL	Send the citation detail with the invoice for clients who query detail. Supplying the trace up front removes almost all invoice disputes before they start.

Completed-milestone-only billing

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Milestone billing draws only on milestones with an actual completion date. Partially complete milestones cannot be billed.

HOW TO ACCESS	Automatic in draft invoice generation, with Finance & Billing Operations enabled.
USE IT WELL	Record milestone completion dates promptly. An unrecorded completion date is a whole billing cycle of cash delayed for no reason.

Invoice approval and payment-status tracking

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Invoices move through draft, approved, issued, part-paid and paid, with dates recorded at each step.

HOW TO ACCESS	Command Center > Finance tab > Invoices, with Finance & Billing Operations enabled.
USE IT WELL	Record payment on receipt rather than at reconciliation. Ageing reports are only useful if the paid ones have actually left the list.

Accounts-receivable and collection status

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Full receivables position by client and engagement with ageing bands and collection notes.

HOW TO ACCESS	Reports > Finance > Receivables, with Finance & Billing Operations enabled.
USE IT WELL	Add a dated collection note every time you chase. The note history is what makes an escalation to the client sponsor credible rather than accusatory.

Fixed-fee, time-and-materials, retainer and milestone billing models

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Supports the four commercial models consulting firms actually use, each with the right revenue and billing behaviour.

HOW TO ACCESS	Command Center > Finance tab > Billing model, with Finance & Billing Operations enabled.
USE IT WELL	Set the billing model at engagement creation. Changing it mid-engagement requires reworking how existing approved records are treated.

Write-off and adjustment tracking

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Records write-offs, discounts and adjustments explicitly rather than by silently editing time, so realization is measurable.

HOW TO ACCESS	Command Center > Finance tab > Adjustments, with Finance & Billing Operations enabled.
USE IT WELL	Never fix a billing problem by deleting time. Recorded write-offs are how you learn which service lines are systematically under-scoped.

Accounting-export readiness

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Exports invoices, time, expenses and adjustments in a structured format suitable for your accounting system.

HOW TO ACCESS	Reports > Export > Accounting, with Finance & Billing Operations enabled.

USE IT WELL

Agree the export format with your bookkeeper once and then run it on the same day each month. Consistency here removes most month-end back-and-forth.

12 Financial and margin management

17 features in this area.

Contract value, currency and basic budget

Included on all plans

The commercial frame of the engagement — contracted value, currency and budget — held on the engagement itself and used by every financial calculation.

HOW TO ACCESS	Command Center > Finance tab > Engagement financials.
USE IT WELL	Enter the contract value at conversion from the opportunity. Every margin, burn and forecast figure is meaningless until this field is right.

Basic engagement financial summary

Included on all plans

A plain summary of contract value, approved cost, approved billable time and current position for a single engagement.

HOW TO ACCESS	Command Center > Finance tab > Summary.
USE IT WELL	Read it after each approval run rather than at month end. Weekly reading is what turns finance into a delivery control instead of a report.

Planned versus incurred cost summary

Included on Firm, Enterprise, Custom

Compares the cost you planned to incur against the cost actually approved to date.

HOW TO ACCESS	Command Center > Finance tab > Planned vs incurred, on the Firm plan and above.
USE IT WELL	Compare cost variance against completion, not against elapsed time. Being 60 percent through the calendar means nothing; being 60 percent through the budget at 30 percent complete means everything.

Basic engagement revenue and gross-margin summary

Included on Firm, Enterprise, Custom

Revenue recognized and gross margin for one engagement, based on approved records and the engagement's billing model.

HOW TO ACCESS	Command Center > Finance tab > Margin, on the Firm plan and above.
USE IT WELL	Check margin at every phase gate. A gate is the last point where scope, staffing or approach can still be changed cheaply.

Basic budget health

Included on Firm, Enterprise, Custom

A simple green / amber / red budget signal per engagement derived from burn against completion.

HOW TO ACCESS	Command Center > Finance tab, and on engagement cards, on the Firm plan and above.
USE IT WELL	Treat an amber budget with a green schedule as the more dangerous combination. It usually means effort is being absorbed rather than surfaced.

Portfolio-level financial summaries

Included on Enterprise, Custom

Revenue, cost and margin summarized across every engagement in the firm.

HOW TO ACCESS	Reports > Finance > Portfolio, on the Enterprise plan.
USE IT WELL	Review by service line as well as by engagement. Firm-level averages routinely hide one loss-making service line funded by another.

Portfolio revenue, margin and outstanding-cash summary

Included on Enterprise, Custom

Combines delivery profitability with the cash position, so revenue, margin and outstanding receivables are read together.

HOW TO ACCESS	Reports > Finance > Portfolio, on the Enterprise plan.
USE IT WELL	Read margin and outstanding cash on the same screen every month. Profitable firms fail on cash, not on margin.

Multi-engagement budget health

Included on Enterprise, Custom

Budget health across all active engagements in one view, ranked by exposure.

HOW TO ACCESS	Reports > Finance > Budget health, on the Enterprise plan.
USE IT WELL	Deal with the largest absolute exposure first, not the worst percentage. A five percent overrun on the biggest engagement usually outweighs a forty percent overrun on the smallest.

Expanded financial audit history

Included on Enterprise, Custom

A full audit trail of financial changes — approvals, rate applications, adjustments, invoice actions — with actor and timestamp.

HOW TO ACCESS	Reports > Finance > Audit, on the Enterprise plan.
USE IT WELL	Export it at each quarter end and keep it with your accounts. It answers auditor and client questions without reopening live records.

Revenue recognized, cost incurred and gross margin in detail

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Line-level detail behind the revenue, cost and margin figures, so any number can be decomposed to its records.

HOW TO ACCESS	Command Center > Finance tab > Detail, with Finance & Billing Operations enabled.
USE IT WELL	Use the detail view to answer questions rather than rebuilding the analysis in a spreadsheet. Spreadsheet copies drift and then get quoted.

Burn versus calculated project completion

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Sets budget consumed against calculated completion, exposing engagements consuming money faster than they are producing progress.

HOW TO ACCESS	Command Center > Finance tab > Burn, with Finance & Billing Operations enabled.
USE IT WELL	This is the single most predictive chart in the system. Any engagement where burn leads completion by more than ten points needs a conversation this week.

Detailed forward revenue, cost and margin forecast

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Projects revenue, cost and margin forward from planned work, allocations and rates, rather than from a straight-line assumption.

HOW TO ACCESS	Command Center > Forecast tab, with Finance & Billing Operations enabled.
USE IT WELL	Refresh the forecast after every replan. A forecast built on a superseded plan is worse than none, because it is quoted with confidence.

Weekly allocations with per-person overallocation flags

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

Week-by-week allocation of each person to engagements, with clear flags where commitments exceed capacity.

HOW TO ACCESS	Command Center > Forecast tab > Allocations, with Finance & Billing Operations enabled.
USE IT WELL	Keep allocations current — the cost forecast is computed from them. Stale allocations produce a forecast that quietly understates cost.

Unrated people excluded and named — no rate is ever guessed

Requires the Finance & Billing Operations module on all plans; included in the Complete Consulting Operations bundle

If a person has no applicable rate, they are excluded from the financial calculation and named explicitly. The system never substitutes an assumed or average rate.

HOW TO ACCESS	Shown as an exclusion note on financial and forecast views, with Finance & Billing Operations enabled.
USE IT WELL	Clear the exclusion list before relying on any margin figure. A named exclusion is a known gap; an assumed rate would be an invisible error.

Firm-wide capacity and utilization forecasting

Requires the Resource Capacity & Margin Intelligence module on all plans; included in the Complete Consulting Operations bundle

Forecasts capacity and utilization across the entire firm, combining committed delivery and expected work.

HOW TO ACCESS	Reports > Forecast > Firm capacity, with Resource Capacity & Margin Intelligence enabled.
USE IT WELL	Set a realistic target utilization band and manage to it. Chasing maximum utilization removes the slack that absorbs delivery risk.

Portfolio margin intelligence

Requires the Resource Capacity & Margin Intelligence module on all plans; included in the Complete Consulting Operations bundle

Analyzes margin patterns across engagements, clients and service lines to show where the firm actually makes money.

HOW TO ACCESS	Reports > Finance > Margin intelligence, with Resource Capacity & Margin Intelligence enabled.
USE IT WELL	Review it quarterly against your pricing. This is the evidence base for raising prices or retiring a service line, and it takes a quarter of data to be reliable.

Financial approval controls

Included on Enterprise, Custom

Defines who may approve time, expenses, invoices and adjustments, and at what thresholds, enforced server-side.

HOW TO ACCESS	Firm settings > Approvals, on the Enterprise plan.
USE IT WELL	Separate the person who records from the person who approves wherever headcount allows. It is the simplest control that materially reduces financial error.

13 Portfolio management

6 features in this area.

Portfolio view with health indicators

Included on Firm, Enterprise, Custom

Every active engagement in one list with health, completion, owner and key dates.

HOW TO ACCESS	App > Projects, on the Firm plan and above.
USE IT WELL	Sort by health rather than by name and start at the top. The list exists to direct attention, not to inventory work.

Portfolio completion reporting

Included on Firm, Enterprise, Custom

Calculated and official completion across the portfolio, so firm-wide delivery progress is measurable.

HOW TO ACCESS	Reports > Portfolio > Completion, on the Firm plan and above.
USE IT WELL	Compare calculated against official across the portfolio. A firm-wide gap is a symptom of a planning standard problem, not of individual manager optimism.

Firm-wide portfolio dashboard

Included on Enterprise, Custom

A leadership dashboard combining delivery health, financial position, capacity and attention items across the firm.

HOW TO ACCESS	App > Portfolio dashboard, on the Enterprise plan.
USE IT WELL	Make this the standing first agenda item of the leadership meeting. It replaces the round-the-table update with a shared, factual starting point.

Business-unit or practice-area views

Included on Enterprise, Custom

Segments the portfolio by practice area or business unit, each with its own health, margin and capacity view.

HOW TO ACCESS	Portfolio dashboard > filter by unit, on the Enterprise plan.
USE IT WELL	Tag every engagement to a practice area at creation. Retro-tagging is the reason most firms never get clean practice-level reporting.

Multi-office visibility

Included on Enterprise, Custom

Portfolio reporting across multiple offices or geographies with consolidated and per-office views.

HOW TO ACCESS	Portfolio dashboard > filter by office, on the Enterprise plan.
USE IT WELL	Standardize phase names and roles across offices first. Without that, consolidated reporting compares things that are not comparable.

Portfolio delivery alerts

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Automatic firm-level alerts when any engagement crosses a defined delivery risk threshold.

HOW TO ACCESS	Portfolio dashboard > Alerts, with Advanced Project Operations enabled.
USE IT WELL	Tune the thresholds until you get a handful of alerts a week. An alert stream nobody can read is functionally the same as no alerts.

14 Reporting

7 features in this area.

Practice-level reporting

Included on all plans

Core reporting for a single practice: pipeline, engagements, tasks, time and basic financials.

HOW TO ACCESS	App > Reports.
USE IT WELL	Pick three reports and read them on a fixed schedule. Consistent reading of a few reports beats occasional reading of all of them.

Project and portfolio dashboards

Included on Firm, Enterprise, Custom

Visual dashboards at both the engagement and portfolio level covering delivery and financial position.

HOW TO ACCESS	App > Reports > Dashboards, on the Firm plan and above.
USE IT WELL	Use the engagement dashboard in client meetings. Showing the same view you manage from builds more confidence than a polished slide.

Firm-level financial reporting

Included on Firm, Enterprise, Custom

Consolidated revenue, cost, margin and receivables reporting for the firm.

HOW TO ACCESS	Reports > Finance, on the Firm plan and above.
USE IT WELL	Reconcile it against your accounting system monthly. Small persistent differences almost always trace to unapproved time or unrecorded payments.

Advanced reporting

Included on Enterprise, Custom

Deeper analytical reporting across delivery, finance, capacity and portfolio, with richer filtering and segmentation.

HOW TO ACCESS	Reports > Advanced, on the Enterprise plan.
USE IT WELL	Save the filter sets you use repeatedly. Rebuilt-from-scratch analysis produces inconsistent answers to the same question.

Advanced portfolio and project delivery reporting

Requires the Advanced Project Operations module on Enterprise and Custom; included in the Complete Consulting Operations bundle

Delivery-focused analytics including dependency risk, milestone attainment, throughput and slippage across the portfolio.

HOW TO ACCESS	Reports > Delivery > Advanced, with Advanced Project Operations enabled.
USE IT WELL	Track slippage trend rather than a point-in-time count. The trend tells you whether your planning is improving; the count only tells you today's weather.

Data export

Included on all plans

Export your data in structured formats for analysis, reporting or migration. Your records remain yours.

HOW TO ACCESS	Reports > Export.
USE IT WELL	Take a scheduled export each quarter and store it outside the system. It is cheap insurance and it satisfies most client data-governance questions.

Custom reporting

Available on the Custom plan

Reports built to your specification where the standard set does not fit.

HOW TO ACCESS	Available on the Custom plan; specified with ClientPulse during onboarding.
USE IT WELL	Live with the standard reports for a full quarter before commissioning custom ones. Most requests turn out to be a filter, not a new report.

15 Roles and permissions

7 features in this area.

Engagement-level access control

Included on Enterprise, Custom

Access is granted per engagement, so people see only the engagements they are on. There is no firm-wide default visibility.

HOW TO ACCESS	Command Center > Team tab; enforced by engagement access records, on the Enterprise plan.
USE IT WELL	Remove people from the team list the day they roll off. Dormant access is the most common finding in any client security review.

Role-based access enforced server-side

Included on Enterprise, Custom

Owner, Engagement Manager, consultant, contractor and client-viewer roles are enforced on the server, so restricted data is never sent to an unauthorized browser.

HOW TO ACCESS	Command Center > Team tab > role selector, on the Enterprise plan.
USE IT WELL	Test each role once with a real account after setup. Seeing the restriction working is worth more than reading that it exists.

Financial-data access control

Included on Enterprise, Custom

Rates, costs, margin and invoices are visible only to roles explicitly permitted to see them.

HOW TO ACCESS	Firm settings > Permissions, on the Enterprise plan.
USE IT WELL	Keep cost rates to the smallest possible group. Bill rates are a commercial matter; cost rates are a personnel one.

Contractor and client-user roles

Included on Enterprise, Custom

Purpose-built restricted roles that let contractors record work and clients view agreed information, without exposing firm financials or other engagements.

HOW TO ACCESS	Command Center > Team tab > role contractor or client_viewer, on the Enterprise plan.

USE IT WELL	Give the client sponsor a client-viewer account rather than emailing status decks. Shared visibility of the same record changes the tone of every status conversation.

Approval permissions

Included on Enterprise, Custom

Controls precisely who may approve time, expenses, deliverables, proposals and invoices.

HOW TO ACCESS	Firm settings > Approvals, on the Enterprise plan.
USE IT WELL	Name a deputy approver for every approval type. A single approver on holiday stops billing, which is an avoidable and expensive outage.

Expanded audit history

Included on Firm, Enterprise, Custom

Extended audit records across engagement, financial and access activity, showing who did what and when.

HOW TO ACCESS	Reports > Audit, on the Firm plan and above.
USE IT WELL	Check access audit records before any client security questionnaire. Answering from evidence is faster than answering from memory.

Custom roles and permissions

Available on the Custom plan

Bespoke roles and permission sets built to match your firm's governance model.

HOW TO ACCESS	Available on the Custom plan; defined with ClientPulse during onboarding.
USE IT WELL	Start from the standard roles and change only what genuinely differs. Every custom role adds a permanent maintenance and review obligation.

16 Integrations

6 features in this area.

Email and calendar connection (Gmail, Outlook, eM Client)

Included on all plans

Connect Gmail, Outlook or eM Client so outreach can be sent and logged, and so email activity appears on the client record.

HOW TO ACCESS	App > Settings > Email connections.
USE IT WELL	Connect the address you actually send client email from. A connected secondary address produces a client history with half the conversation missing.

Data export for accounting

Included on all plans

Structured export of financial records for your accountant or bookkeeper.

HOW TO ACCESS	Reports > Export > Accounting.
USE IT WELL	Run it on the same day each month and hand over one file. Ad-hoc extracts create reconciliation work at both ends.

Accounting integration

Coming soon on Practice, Firm, Enterprise · Available on the Custom plan

Direct integration with accounting platforms, currently in development. Structured export is available today.

HOW TO ACCESS	Coming soon; custom configurations available on the Custom plan.
USE IT WELL	Standardize your export and reconciliation routine now. A clean manual process is what makes the eventual integration a one-day change.

CRM integration

Coming soon on Practice, Firm, Enterprise · Available on the Custom plan

Direct integration with external CRM platforms, currently in development. ClientPulse includes a full native CRM today.

HOW TO ACCESS	Coming soon; custom configurations available on the Custom plan.

USE IT WELL	Keep ClientPulse as the system of record for engagements even where another CRM holds marketing data. Two systems of record for delivery is unworkable.

Single sign-on

Coming soon on Enterprise · Available on the Custom plan

Enterprise single sign-on for centralized identity and access management, in development for the Enterprise plan.

HOW TO ACCESS	Coming soon on Enterprise; available now as a custom configuration.
USE IT WELL	Meanwhile enforce strong unique passwords and remove leavers the same day. Most SSO benefit is offboarding speed, which you can achieve manually.

Custom integrations

Available on the Custom plan

Purpose-built integrations with your existing systems, scoped and delivered with ClientPulse.

HOW TO ACCESS	Custom plan; scoped during onboarding.
USE IT WELL	Define the direction of truth for every shared field before building. Bidirectional sync without an authoritative side always ends in conflicting records.

17 Support and implementation

8 features in this area.

14-day trial

Included on Practice, Firm

A full-function trial of the Practice or Firm plan so you can run real work through the system before committing.

HOW TO ACCESS	Start from the pricing page or clientpulse.ltd.
USE IT WELL	Load one real, live engagement rather than test data. Fourteen days of real delivery answers the question; sample data never does.

Email support

Included on all plans

Support by email for questions, configuration help and issue resolution, included on every plan.

HOW TO ACCESS	App > Help > Contact support.
USE IT WELL	Include the engagement name and a screenshot. It typically removes an entire round trip from the exchange.

Configuration support

Included on Enterprise, Custom

Hands-on help configuring plans, roles, rate cards, templates and reporting to your firm's model.

HOW TO ACCESS	Included on the Enterprise plan; arranged through your ClientPulse contact.
USE IT WELL	Do configuration in one focused session with the decision makers present. Configuration decided by email drifts and gets revisited.

Migration assistance

Included on Enterprise, Custom

Assistance bringing your existing clients, engagements and financial records into ClientPulse.

HOW TO ACCESS	Included on the Enterprise plan; arranged during onboarding.
USE IT WELL	Migrate active engagements first and closed ones later, if at all. Historical migration is the slowest part and rarely the most valuable.

Historical project migration

Available on the Custom plan

Full migration of historical project and financial history for firms that need continuity of the complete record.

HOW TO ACCESS	Custom plan; scoped during onboarding.
USE IT WELL	Agree exactly which historical fields matter before starting. Complete-history migrations expand indefinitely without a defined scope.

Priority support

Included on Enterprise, Custom

Prioritized handling and faster response for Enterprise firms.

HOW TO ACCESS	Included on the Enterprise plan.
USE IT WELL	Name one internal owner for support contact. Routing everything through one person makes recurring issues visible instead of scattered.

Custom onboarding and training

Available on the Custom plan

Tailored onboarding and role-specific training for your team.

HOW TO ACCESS	Custom plan; scheduled during onboarding.
USE IT WELL	Train by role rather than by feature. Consultants, engagement managers and partners each need a different fifteen minutes, not the same ninety.

Dedicated support and contracted service levels

Available on the Custom plan

A named support contact and contractually defined service levels.

HOW TO ACCESS	Custom plan; agreed in the service contract.
USE IT WELL	Match the service level to your genuine operational dependency. Buying a tighter level than you need is a permanent cost for a rare event.